



**ROYAL CANIN®**

INCREDIBLE IN EVERY DETAIL™

Salesforce Champion Guidebook  
2022





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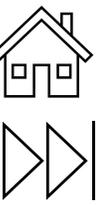


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- This guide will be updated quarterly
- If you'd like to submit a training/support item, please contact [Dennis Alexander](#)



Created by: Dennis Alexander

# ROYAL CANIN® Salesforce Champion Overview



## A Salesforce Champion will...

- Be the resident expert. They will always strive for exemplary work within the Salesforce platform.
- Share knowledge and passion of Salesforce through team calls, emails, texts and 1on1 conversations.
- Help bring insight and testing to future enhancements as needed.
- Continue Salesforce education through monthly meetings
- Honor their commitment as a champion. Give 100% to the champion team.

## Salesforce Requirements

syncs with mobile devices anywhere, anytime via the cloud, so the entire team has the most current information at their fingertips."



# Champion Requirements



**Salesforce Champion requirements** – To be a champion you should be able to complete the following objectives.

As the Champion for your Region, an expectation is that you work with your team in ensuring their understanding of Salesforce optimization which includes the items indicated below. Additionally, you are the voice for your region following the process of escalating requirements or changes to the Customer 360 team through your Lead Salesforce Champion. This will allow for streamlining processes and make the fields use of Salesforce seamless.

- **Daily Utilization of Salesforce**
  - Be the reference – model good habits/behavior
  - Call notes (*event description*) are entered within 24 hours of event or task
  - Events are preplanned 2 weeks in advance
  - Use tasks to document work in an account
    - Phone calls, emails, and other similar tasks.
      - If it's not in Salesforce, did it happen?
- **Accounts and Contacts management**
  - Complete, all applicable fields on the **summary page**
  - Create a new **contact**
    - Understand the difference between a **contact** and a **CFP account**.
  - Utilize **Perfect Account** quarterly while in clinic
  - Understand and use *Notes & Attachments*
  - Create and Manage Cases
- **Einstein Activity Capture** – (Calendar and Email sync)
- **Use Reports**
  - Know the main reports for DM use
    - Vet Period Activity: Planned & Completed
    - Vet – Planned Training – Home Page
    - Tasks open and completed for current
    - Trainings by Period
  - Set Favorites for easy reference
- **Use Account List Views**
  - Clone and create new views
  - Change and create new List Filters
  - Add/Remove Fields to Display
  - Set favorites for easy reference

- **Chatter**
  - Requirement to check Salesforce Champion Team page daily
    - Acknowledge or act upon activity
  - Use Chatter to ask and share questions about the CRM from your team
    - Share successes with Salesforce
    - Create excitement around the platform – for better utilization
- **Libraries/Files**
  - Understand how to use Libraries/Files
- **Einstein Analytics**
  - Use of filters
  - Save & Manage views
- **Dashboards**
  - Know how to access and refresh Dashboards that relate to you
    - DM & RM Dashboard
      - Understand the graphs and reports presented
- **Meetings/Trainings**
  - Block out time to attend monthly Champion meetings
  - Engage and bring ideas to the meeting
  - Take notes and train your team on the presented enhancements.

## As a Salesforce Champion, you will...

- be the resident expert, always setting the example of exemplary work
- share your knowledge and passion, to your region through team calls, emails, texts, and 1 on 1 conversations
- help bring insight and testing to future enhancements as needed
- honor your commitment as a champion. Give 100% to the Champion team



Salesforce Champion Requirements.pdf



# ROYAL CANIN® Salesforce Champion Contact List

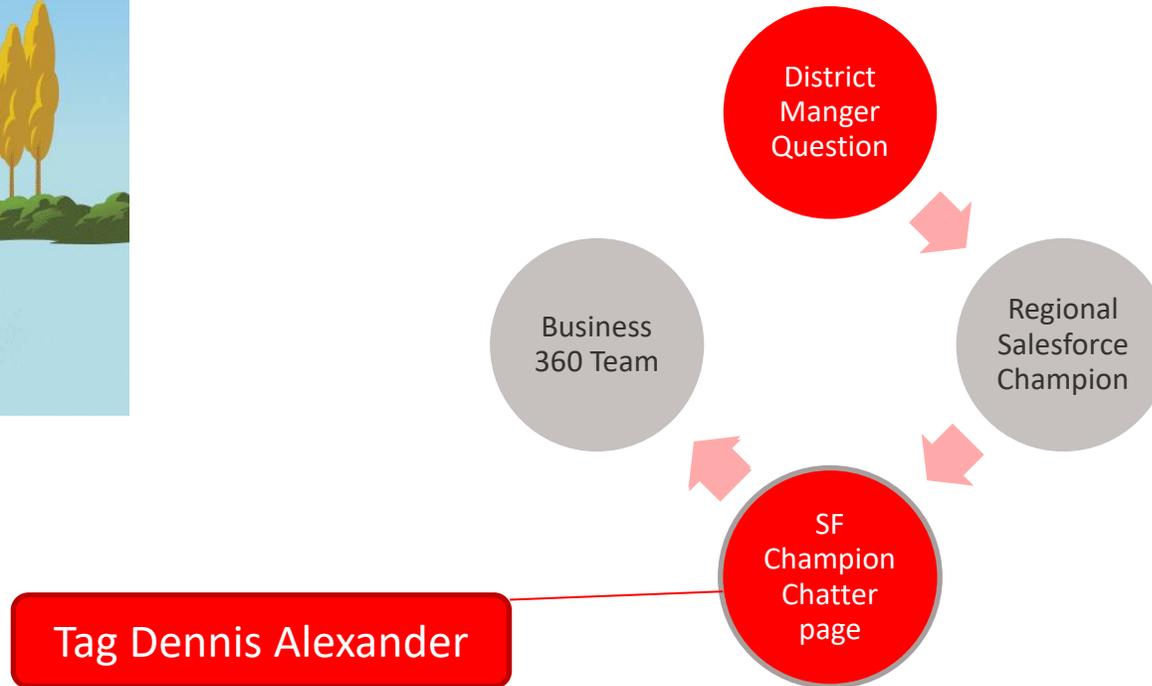


VET DM Champion	RM	Time Zone	Email
Kaitlin Whitley	Heather Villegas	West	<a href="mailto:kaitlin.whitley@royalcanin.com">Kaitlin.whitley@royalcanin.com</a>
Chandy Cambio	Alan Fishback	Central	<a href="mailto:Chandy.cambio@royalcanin.com">Chandy.cambio@royalcanin.com</a>
Chandy Cambio	OPEN	Central	<a href="mailto:chandy.cambio@royalcanin.com">chandy.cambio@royalcanin.com</a>
Chris Kerins	JC Trower	East	<a href="mailto:chris.kerins@royalcanin.com">chris.kerins@royalcanin.com</a>
Debbie Tolley	Greg Brady	East	<a href="mailto:debra.tolley@royalcanin.com">debra.tolley@royalcanin.com</a>
Dennis Alexander	Greg Brady	East	<a href="mailto:dennis.alexander@royalcanin.com">dennis.alexander@royalcanin.com</a>
Heather Cabello	Patrick Dubois	West	<a href="mailto:heather.cabello@royalcanin.com">heather.cabello@royalcanin.com</a>
Jackie Herrmann	Kiel Cathey	Central	<a href="mailto:jackie.herrmann@royalcanin.com">jackie.herrmann@royalcanin.com</a>
Janelle Juvelis	Dan Bacaloglu	East	<a href="mailto:Janelle.juvelis@royalcanin.com">Janelle.juvelis@royalcanin.com</a>
Justin Nelson	Eric Pruitt	East	<a href="mailto:Justin.nelson@royalcanin.com">Justin.nelson@royalcanin.com</a>
John McAlhany	Lisa Perez	East	<a href="mailto:john.mcalhany@royalcanin.com">john.mcalhany@royalcanin.com</a>
Julie Moran	Darren Mackin	Mountain	<a href="mailto:Julie.moran@royalcanin.com">Julie.moran@royalcanin.com</a>
Kate Anderson	Luke Trombley	East	<a href="mailto:Mallory.Roy@royalcanin.com">Mallory.Roy@royalcanin.com</a>
Leah Rombro	Nada Acevedo	West	<a href="mailto:leah.rombro@royalcanin.com">leah.rombro@royalcanin.com</a>
Michelle Mimmack	Kris Eichhorn	Central	<a href="mailto:Michelle.mimmack@royalcanin.com">Michelle.mimmack@royalcanin.com</a>
Mike Fitzgerald	Matt Montoya	West	<a href="mailto:michael.fitzgerald@royalcanin.com">michael.fitzgerald@royalcanin.com</a>
Mike McGhee	Ray Schultz	East	<a href="mailto:mike.mcghee@royalcanin.com">mike.mcghee@royalcanin.com</a>
Nick Wappelhorst	Bill Strautz	Central	<a href="mailto:nick.wapplehorst@royalcanin.com">nick.wapplehorst@royalcanin.com</a>
Phillip Garrett	Alisia Smith-Rucker	East	<a href="mailto:phillip.garrett@royalcanin.com">phillip.garrett@royalcanin.com</a>
Ryan Hilgenberg	Cheryl Wilson	East	<a href="mailto:ryan.hilgenberg@royalcanin.com">ryan.hilgenberg@royalcanin.com</a>
Stacey Arnold	Jeff Ingram	East	<a href="mailto:stacey.arnold@royalcanin.com">stacey.arnold@royalcanin.com</a>

# Questions – Contact chain



What do I do if there is a question I can't answer?



Following this format will allow us to have clear communication and allow the Business 360 Team to complete tasks in a timely manner.



# CORE FUNCTIONS

# CORE | CUSTOM DOMAIN LOG IN



The image shows the standard Salesforce login page. The Salesforce logo is at the top. Below it are fields for Username and Password, both containing a red "DO NOT USE" button. A blue "Log In" button is below the password field. There is a "Remember me" checkbox and a "Forgot Your Password?" link. A red circle highlights the "Use Custom Domain" link at the bottom right.

The image shows the "Use Custom Domain" page. It features the Salesforce logo and the heading "Use Custom Domain". A red circle highlights the "Click graphic to log-in" text. Below is a text box with the instruction "To go to your company's login page, enter the custom domain name." A "Custom Domain" field contains "royalcanin-us.lightning.force.com". Below the field is the URL "https://royalcanin-us.lightning.force.com" and two buttons: "Back" and "Continue".



## WHAT IS A CUSTOM DOMAIN:

A unique branded name that identifies an org.

## WHY DOES ROYAL CANIN USE A CUSTOM DOMAIN?

A custom domain helps Royal Canin better manage login and authentication for our organization.

## WHAT DEVICES DO WE USE A CUSTOM DOMAIN?

All devices that you access Salesforce for work.

## IS THE DOMAIN CASE SENSITIVE?

The custom domain should be typed just as you see it, no capital letters. It is case sensitive

## IS THE DOMAIN CASE SENSITIVE?

You will use the custom domain on your desktop, iPad, or phone. If you login from a NON-MARS computer, you will still use the custom domain.

Every associate accessing Salesforce must be using the custom domain for access.

royalcanin.-us.lightning.force.com

# CORE | CUSTOM DOMAIN

Connecting to   
Sign-in with your Mars Group account to access Salesforce  
RoyalCanin US


You have connected to a proprietary system. Only authorized users may access this system. Access by unauthorized individuals is prohibited.

(Email Address)

Remember me

[For help logging in, click here.](#)


Select an authentication factor

- Okta Verify (Dennis' iPhone)
- SMS Authentication
- Voice Call Authentication
- Security Question

[Back to sign in](#)


Okta Verify (Dennis' iPhone)

Or enter code

Send push automatically

Do not challenge me on this device again

[Back to sign in](#)



# CORE | EVENTS



**Events** are activities that help conduct meetings, gatherings, appointments, and similar events that have a scheduled time, date and duration.

- Events talk about where, what, and what's next.

Field	Act
Assigned To	Auto-populates or change to associate event is being assigned to. Only assigned owner can make changes. Once assigned it can't be reassigned.
Vet Event Type	Choose from Picklist: Appointment/Visit Training Misc./Office (never associate with a clinic)
Business Topic	City Pilot (Events or training involved in pilot) JBP (Joint Business Plans) Marketing Initiative (marketing direct initiatives) NA/MVH Initiative (national or MARS Vet Hospitals) OLP (Online Pharmacy)
Nutrition Topic	Choose the topic that best fits what you discussed during the event <a href="#">MORE</a>
Audience	Who did you meet with?
Subject – Be specific	Example: Start of life – Gastro
Call Objective	Should be specific and trackable. Ask yourself if this objective is motivating to you, attainable and relevant to the account.
Start and End Time	This should reflect the time you worked on the event.
Visit: Required Field	Did you work In-Clinic or Virtual?
Stakeholder	Did you work with any of the stakeholder on this event.
Description	Who did you meet with? What was their response? Did you meet your objective?
Next Step	Who do you need to meet with next? How will you build on what you accomplished today?
Related	Auto populates
Name	You can search a contact to attach to the event

Vet Event | New Task | Create Tra...

\*Assigned To  
Dennis Alexander

\*Vet Event Type  
--None--

Business Topic  
--None--

Nutrition Topic  
--None--

Audience  
--None--

Subject

\*Call Objective

**Start**  
\*Date: Feb 23, 2022 \*Time: 4:00 PM

**End**  
\*Date: Feb 23, 2022 \*Time: 5:00 PM

\*Visit  
--None--

**Stakeholder**

Available: DSS, SSV, KAM/NAM, National Account/Leadership

Chosen:

Description

Next Step

Related To  
Seven Oaks Pet Hospital

Name  
Search Contacts...

Location

Attendees  
**People** Resources  
Dennis Alexander

All-Day Event

Save



## Video - 2022 Enhancements



# Core | Events



## Events



\*Vet Event Type

--None--

✓ --None--

Appointment/Visit

Training

Misc - Office

## Events

- **Appointments**
  - An appointment is a **VET EVENT** that is completed *virtually* or *In-Person* with a clinic
  - The appointment should be preplanned 2 weeks in advance
- **Trainings**
  - A training should be pre-planned in Salesforce
  - If a training is not preplanned the same process is to be followed.

This is your primary business objective for your appt. or training.

Business Topic ⓘ

--None--

✓ --None--

City Pilot ➤ Use when you are part of the City Pilot

JBP ➤ Joint Business Plans with clinics

Marketing Initiative ➤ Topics & Materials that derive from Marketing

NA/MVH Initiative ➤ All Topics - National Accounts and MARS Veterinary Hospitals

OLP ➤ All Topics regarding our OLP Partners

Nutrition Topic

--None--

✓ --None--

Case-based ➤ All projects working with Dr. Cindy Lovern

Derm ➤ All Dermatology nutrition topics

GI ➤ All Gastrointestinal nutrition topics

Health Management ➤ All Health management & Healthy Pet nutrition topics

Urinary ➤ All Urinary & Hematuria by BluCare nutrition topics

Vital Support ➤ All Vital Support nutrition topics

Subject

➤ Be Specific Example – “Start of Life – Gastro Puppy & Kitten”

\* Call Objective ⓘ

➤ Should be specific and trackable.

➤ Ask yourself if this objective is motivating to you, attainable and relevant to the account.

Start

\* Date \* Time

Feb 18, 2022 11:00 AM

➤ Document your visit time

End

\* Date \* Time

Feb 18, 2022 12:00 PM

\* Visit

--None--

✓ --None--

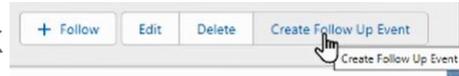
Virtual

In Person





1. Complete the current event
2. Open the event that you just completed and click
- 3.



## [Video - Create a Follow up Event](#)

### Create Follow Up Event

**\* Next Step** 📘 **\* Assigned To**

training April 6 at 3:00pm, Start of Life - GI Puppy discuss the new PP Slides. ✕ Dennis Alexander ✕

**\* Follow Up Start** **\* Follow Up End** 📘

Date	Time	Date	Time
4/1/2022 <span>📅</span>	9:00 PM <span>🕒</span>	4/1/2022 <span>📅</span>	9:30 PM <span>🕒</span>

**\* Follow Up Visit**  
Virtual ▼

**\* Follow Up Vet Event Type**  
Training ▼

Follow Up Business Topic  
Marketing Initiative ▼

Follow Up Nutrition Topic  
GI ▼

**\* Follow Up Subject**  
TRAINING: VIERA EAST VETERINARY CENTER

Cancel Save

Your new business objective is carried over from your next step in the previous event.

Auto populates to 4 weeks, you can adjust. If you adjust make sure you change both dates. Change the time as well to the time you want to complete the next event.



**Tasks are things to do: They don't have a start time, an end time, or usually an attendee.**

## Use tasks to set deadline reminders, manage records, and organize your work week.

- The task reminder field is where the magic happens.
- You can elect to receive notifications as a task's deadline approaches or when the task is overdue, which helps you prioritize work.
- Create a task reminder to customize a slide deck two days before delivering a training.
- Give yourself a heads-up two hours before you promised to update a customer on their order status or case.
- Reminders ensure that deadlines never slip through the cracks.
- Tasks can be one-time or recurring.
- A recurring task can come in handy for a monthly account outreach or Backorder update.
- Daily reminder to follow up on a high-risk support case.

## As an individual contributor, you lean on tasks for two reasons:

- Manage standalone to-do list items: Cases, track an order, or send a backorder notification email.
- Manage specific records: Set a task to act on an account, opportunity, or marketing event.

## You have four options to manage tasks:

- **List Views:** Want to know today's priorities? Check Tasks Due Today and Overdue Tasks in **the Tasks object when you start your shift.**
- **Split View in the Service Console:** Want to see task details from the list view? Open your list of Tasks Due Today or Overdue Tasks in split view, and then open individual tasks without losing sight of the full list.
- **Kanban board:** Need to know the status of your to-do list items or those of your whole team? Use your Kanban board to monitor tasks that are new, in progress, on hold, or completed.
- **Mobile App:** Travel for work? Stay organized by viewing and managing tasks on your mobile phone.

How to  
do a TASK

View Samples

# CORE | TASKS



New Task

---

Select a record type

Standard Task  
Used to log standard account tasks

Trade Show  
Used for trade show task assignments VMX WVC. (SCH-0078)

Cancel Next



Field	Action
Assigned to	Auto populates, and can be changed to assign to another associate
Due Date	What is the date you want this task completed?
Status	Choose, Not Completed or Complete
Reminder Set	Click for a reminder and set date and time
Priority	Choose urgency to complete
Related to	Auto populates or choose account
Type	Choose from the drop down the best choice
Name	Choose a contact to associate with
Comments	This is where you will place your notes for the task

New Task: Standard Task

---

Task Information

Assigned To:

Due Date:

1 Total Task

\* Status:

Reminder Set:

Date:  Time:

\* Priority:

---

Additional Information

\* Subject:

Related To:

\* Type:

Name:

---

Description Information

Comments:

Save & New Cancel Save



# CORE | Tasks Miscellaneous

**DEFINITION:** Tasks are things to do, a "point in time" (no duration), such as prepare meeting notes, set up for a training or Market meeting, send FedEx Package, reminder to call a clinic, emails, or a reminder of any sort.

**Subject** - can be whatever you like that describes the task. Example: Drop off QR Stickers for OLP, Call clinic regarding voicemail, or send an email. The subject should be a quick line about the task that you are doing or have done.

**Type** - pick from one of the drop-down options that best fits the task. This is not a mandatory field.

**Name** - not required, however, helps you keep track of who the task was with. This is connected to your related contact accounts.

**Assigned To** - Auto populates but can be changed to what associate the task is assigned.

**Status** - Is the task completed or Not Completed.

**Reminder Set** - Click button if you want a reminder or leave unchecked if you do not want a reminder

**Date** - Target date for reminder.

**Comments** - Should relate to what was completed during the task.

**Due Date** - Target date for completion

**Related To** - Auto populates but can be changed to what account the task is assigned.

Vet Event   New Task   Create Tra...      

Subject

Type  
--None--

Comments ⓘ

Due Date

Name  
Search Contacts...

Related To  
 Search Accounts...

\* Assigned To  
 Search People...

\* Status  
Not Completed

Reminder Set

Date   Time

Save

# CORE | TASKS - VIEWS



**Open Tasks** 35 items • Updated a few seconds ago

Q Search this list...

**Due Date** ↑

- Follow up on refund check case  
Atlantic Veterinary Clinic Inc  
Kim Pierson  
1/25/2022
- VMX OLP Check in - OLP Training  
Pebble Creek Vet Med Group  
Alex de Gale  
1/25/2022
- Weekly Backorder Report - alexisvet@gmail.com & quailhollow@nvanet.com  
NVA QUAIL HOLLOW ANIMAL HOSP  
1/26/2022
- Weekly- Wednesday Backorder Report - staff@rockledgeanimalclinic.com  
Rockledge Animal Clinic  
Lindsay Lanthorne  
1/26/2022
- Weekly Backorder Report - Rachel Singletary <rachel.singletary@familyvetgroup.com>  
Highland Square Family Vet  
1/26/2022
- Wednesday Backorder Report - animalclinic1450@gmail.com  
Natali S. Ibarra Animal Clinic  
1/26/2022
- Weekly Backorder Report - chahinvoices@gmail.com  
CLEVELAND HEIGHTS ANIMAL HOSP  
1/26/2022
- Weekly Backorder Report - scorwin@americanveterinarygroup.com  
AVG Circle of Life Animal Hosp  
1/26/2022

**Task**  
**Follow up on refund check case**

Name: [Kim Pierson](#) Related To: [Atlantic Veterinary Clinic Inc](#)

Mark Complete Create Follow-Up Task Edit Edit Comments

## Split-View (Table)

**Details** Related

Task Information

Assigned To: [Dennis Alexander](#) Due Date: 1/25/2022

Status: Not Completed Reminder Set: Jan 25, 2022 at 8:30 am

Priority: Normal

Additional Information

Subject: Follow up on refund check case Related To: [Atlantic Veterinary Clinic Inc](#)

Type: Email Name: [Kim Pierson](#)

Description Information

Comments

System Information

Created By: [Dennis Alexander](#), 1/11/2022 2:08 PM Last Modified By: [Dennis Alexander](#), 1/11/2022 2:08 PM

**Tasks**  
**Open Tasks** 35 items • Sorted by Due Date • Filtered by My tasks - Closed, Recurring Parent, Due Date • Updated a few seconds ago

Q Search this list...

## List

New Task

Subject	Name	Related To	Due Date	Status	Priority	Assigned Alias	Last Modified Date/Time	Last Modified By
<a href="#">Follow up on refund check case</a>	<a href="#">Kim Pierson</a>	<a href="#">Atlantic Veterinary Clinic Inc</a>	1/25/2022	Not Completed	Normal	dalex	1/11/2022 2:08 PM	dalex
<a href="#">VMX OLP Check in - OLP Training</a>	<a href="#">Alex de Gale</a>	<a href="#">Pebble Creek Vet Med Group</a>	1/25/2022	Not Completed	Normal	dalex	1/17/2022 8:43 AM	dalex
<a href="#">Weekly Backorder Report - alexisvet@gmail.com &amp; quailhollow@nvanet.com</a>		<a href="#">NVA QUAIL HOLLOW ANIMAL HOSP</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 1:21 PM	dalex
<a href="#">Weekly- Wednesday Backorder Report - staff@rockledgeanimalclinic.com</a>	<a href="#">Lindsay Lanthorne</a>	<a href="#">Rockledge Animal Clinic</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 1:21 PM	dalex
<a href="#">Weekly Backorder Report - Rachel Singletary &lt;rachel.singletary@familyvetgroup.com&gt;</a>		<a href="#">Highland Square Family Vet</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 1:18 PM	dalex
<a href="#">Wednesday Backorder Report - animalclinic1450@gmail.com</a>		<a href="#">Natali S. Ibarra Animal Clinic</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 10:35 AM	dalex
<a href="#">Weekly Backorder Report - chahinvoices@gmail.com</a>		<a href="#">CLEVELAND HEIGHTS ANIMAL HOSP</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 11:58 AM	dalex

16

# CORE | TASKS - VIEWS



Tasks **Open Tasks** Kanban

35 items • Sorted by Due Date • Updated a few seconds ago

**Not Completed (35)** **Completed (0)** **Navision Note (0)**

- Follow up on refund check case  
Kim Pierson  
Atlantic Veterinary Clinic Inc  
1/25/2022
- VMX OLP Check in - OLP Training  
Alex de Gale  
Pebble Creek Vet Med Group  
1/25/2022
- Weekly Backorder Report - alexisvet...  
NVA QUAIL HOLLOW ANIMAL HOSP  
1/26/2022
- Weekly- Wednesday Backorder Rep...  
Lindsay Lanthome  
Rockledge Animal Clinic  
1/26/2022



# CORE | TASKS - VIEWS



Tasks **Open Tasks**

35 items • Sorted by Due Date • Filtered by My tasks - Closed, Recurring Parent, Due Date • Updated a few seconds ago

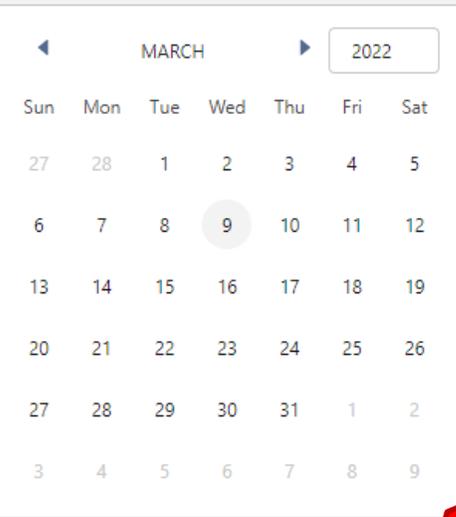
Search this list...

	Subject	Name	Related To	Due Date ↑	Status	Priority	Assigned Alias	Last Modified Date/Time	Last Modified By Al...
1	<a href="#">Follow up on refund check case</a>	<a href="#">Kim Pierson</a>	<a href="#">Atlantic Veterinary Clinic Inc</a>	1/25/2022	Not Completed	Normal	dalex	1/11/2022 2:08 PM	dalex
2	<a href="#">VMX OLP Check in - OLP Training</a>	<a href="#">Alex de Gale</a>	<a href="#">Pebble Creek Vet Med Group</a>	1/25/2022	Not Completed	Normal	dalex	1/17/2022 8:43 AM	dalex
3	<a href="#">Weekly Backorder Report - alexisvet@gmail.com &amp; quailhollow@nvanet.com</a>		<a href="#">NVA QUAIL HOLLOW ANIMAL HOSP</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 1:21 PM	dalex
4	<a href="#">Weekly- Wednesday Backorder Report - staff@rockledgeanimalclinic.com</a>	<a href="#">Lindsay Lanthorne</a>	<a href="#">Rockledge Animal Clinic</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 1:21 PM	dalex
5	<a href="#">Weekly Backorder Report - Rachel Singletary &lt;rachel.singletary@familyvetgroup.com&gt;</a>		<a href="#">Highland Square Family Vet</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 1:18 PM	dalex
6	<a href="#">Wednesday Backorder Report - animalclinic1450@gmail.com</a>		<a href="#">Natali S. Ibarra Animal Clinic</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 10:35 AM	dalex
7	<a href="#">Weekly Backorder Report - chahinvoices@gmail.com</a>		<a href="#">CLEVELAND HEIGHTS ANIMAL HOSP</a>	1/26/2022	Not Completed	Normal	dalex	1/24/2022 11:58 AM	dalex

# CORE | Tasks on Calendar



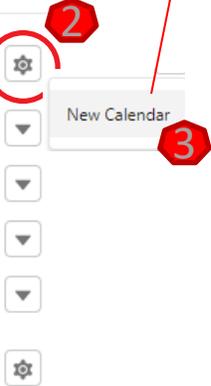
- To allow tasks to show up on your Salesforce Calendar – click on the Calendars tool bar on the top of the page. Then navigate to the bottom right corner – where you will see – My Calendars



## My Calendars

- My Events
- Microsoft® Office 365®
- My Tasks
- OLP Target Plans

## Other Calendars



## Create Calendar

Step 1 of 2

Create a calendar from a Salesforce standard or custom object.

\*Object Select Task from the Picklist

Task

Next



## Edit Calendar

Complete the form as shown here

\*Calendar Name

My Tasks

**Start and Duration of Calendar Items**

\*Field for Start i Field for End i

Due Date Only (Date) Field for End i

None

Apply a Filter i \*Field Name to Display i

Open Tasks Field Name to Display i

Subject

Cancel Save



Once you click save, any tasks with a date will show on the top of your calendar. Pick a color that is to your liking.





## Today's Events



Looks like you're free and clear the rest of the

[View Calendar](#)

Maintenance of Tasks can be done on the home screen. It's important to check your overdue tasks, and close them out or complete them.

## Vet - Planned Training - Home Page

We can't draw this chart because there is no data.

[View Report](#)

As of Yesterday at 5:15 PM

## Today's Tasks



Nothing due today. Be a go-getter, and check back soon.

[View All](#)



- ✓ Today
- My Tasks
- All Overdue
- Completed Within Last 7 Days
- Delegated Tasks

Sort by:

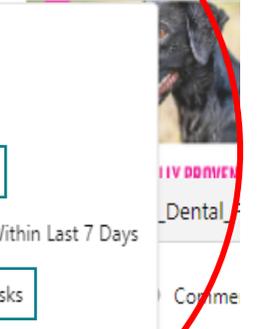
Latest Posts ▾

[RETAIL Marketing](#)  
2h ago

Hi team! The Eukanuba d language. Please see the budgets, there are no pla

Please let me know if you

cc [@Ben Washburn](#) [@Bill](#)



[William Zerkel](#) likes this.

Write a comment

[Customer Care E](#)  
4h ago

Reminder: Consumer Car

# New Contact



Complete the \*required fields. Don't forget to add an email address so your emails sync.

## New Contact: Consumer Contact

### Contact Information

Contact Owner

Dennis Alexander

\* Name

Salutation

--None--

First Name

First Name

\* Last Name

Last Name

\* Account Name

Seven Oaks Pet Hospital

\* Title

DVM, Practice Manager, Tech, Reception

Nominate for PHNC trip

Why nominated for PHNC

Email

Application Email

Emails will sync to account and contact if you have an email address.

Phone

(813) 929-4100

Mobile

Other Phone

### Additional Information

Royal Canin Advocate

Eukanuba Advocate

Nutritional Advocate

Spouse/Partner Name

Birthdate

Pet Types / Names / Diet

University Attended

Children's Names

Contact's Availability

Available

Monday

Tuesday

Wednesday

Thursday

Friday

Chosen

### Billing contact

Billing Contact

Billing Contact Email Address

Billing Contact Phone number

Cancel

Save & New

Save

# CORE | Create a Contact



Account  
**Seven Oaks Pet Hospital**

[+ Follow](#) [Edit](#) [Joint Business Plan](#) [OLP Opportunity](#)

Bill To Customer ID: VET-0011088  
Ship To Customer No: VET-0011088-001  
Shipping Address: 27027 State Rd 56, Wesley Chapel, FL 33544, US

- [Opportunities \(1\)](#)
- [Perfect Accounts \(0\)](#)
- [Related Contacts \(10+\)](#)
- [Related Accounts \(10+\)](#)
- [Notes \(1\)](#)
- [Files \(5\)](#)
- [Notes & Attachments \(6\)](#)
- [Cases \(10+\)](#)
- [GHA Kits \(2\)](#)
- [Market Meeting Account...](#)
- [Account History \(10+\)](#)

Accounts > Seven Oaks Pet Hospital  
**Related Contacts**

14 items • Sorted by Account Name • Updated a few seconds ago

**A TRUE contact:** Contact Name is the employee's name, and the account name is the hospital name.  
**A CFP account\*:** Contact Name and Account Name match  
For your emails to sync, you will need to have an email address in the true contact line.  
**\* The CFP account does not need an email address.**

[New Contact](#) [Add Relationship](#)

Accounts > Seven Oaks Pet Hospital  
**Related Contacts**

14 items • Sorted by Account Name • Updated 4 minutes ago

Contact Name	Billing Contact	Account Name	Phone	Email	Title
1 Christina Blume	<input type="checkbox"/>	Christina Blume	(863) 797-9958		Ms
2 Christy Martina	<input type="checkbox"/>	Christy Martina	(813) 713-0331		Ms.
3 Courtney Pellerin	<input type="checkbox"/>	Courtney Pellerin	(504) 201-3507	courtneydpellerin@gmail.com	DVM
4 Diana Munoz	<input type="checkbox"/>	Diana Munoz	(787) 565-5843	dmunozdvm@gmail.com	DVM
5 Dyondra Roszbach	<input type="checkbox"/>	Dyondra Roszbach	(813) 957-5875		Staff
6 Guadelupe Cortes	<input type="checkbox"/>	Guadelupe Cortes	(813) 412-0964		Bookkeeper
7 Jalan Wishik	<input type="checkbox"/>	Jalan Wishik	(813) 404-8118	wishijal@gmail.com	DVM
8 Nathanael Jones	<input type="checkbox"/>	KC Marketing	(336) 996-3884		Staff
9 Samantha Haack	<input type="checkbox"/>	Samantha Haack	(813) 777-5605		Staff
10 Melanie Calderon	<input type="checkbox"/>	Seven Oaks Pet Hospital	(813) 929-4100	sevenoakspetpm@gmail.com	Hospital Administrator
11 Marymargaret Staple	<input type="checkbox"/>	Seven Oaks Pet Hospital	(813) 929-4100	practicemanager@sevenoakspet.com	Practice Manager
12 Kelly Luer	<input type="checkbox"/>	Seven Oaks Pet Hospital		officemanager@sevenoakspet.com	Practice Manager
13 Susie Moore	<input type="checkbox"/>	Seven Oaks Pet Hospital	(813) 929-4100	clientcare@sevenoakspet.com	Inventory Manager
14 Traiver Graham	<input type="checkbox"/>	Traiver Graham	(352) 457-3313		Staff



# CORE | Contacts – Sync with email



Accounts > Viera East Veterinary Center  
**Related Contacts**

24 items • Sorted by Contact Name • Updated a few seconds ago

	Contact Name ↑	Billin...	Account Name	Title	Email	Phone	
1	Alison Bywater	<input type="checkbox"/>	Viera East Veterinary Center	DVM		(321) 639-9888	▼
2	Angie Carter	<input type="checkbox"/>	Angie Carter	Veterinary technicia		(321) 258-6484	▼
3	Carlos Basabe	<input type="checkbox"/>	Viera East Veterinary Center	DVM		(321) 639-9888	▼
4	Chaniel-Haley Cluckey	<input type="checkbox"/>	Chaniel-Haley Cluckey	kennel technician		(660) 687-9383	▼
5	courtney nerlinger	<input type="checkbox"/>	courtney nerlinger	ms		(240) 405-3436	▼
6	cresha kons	<input type="checkbox"/>	cresha kons	ms		(386) 569-6406	▼
7	Crystal Shepard	<input type="checkbox"/>	Crystal Shepard	Vet tech		(912) 484-8640	▼
8	Cynthia Werle	<input type="checkbox"/>	Cynthia Werle	Techh		(321) 960-6865	▼
9	Darcy Fober	<input type="checkbox"/>	Darcy Forber	DVM	dwintig@aol.com	(321) 258-5403	▼
10	Denise Barber	<input type="checkbox"/>	Denise Barber	Receptionist		(321) 890-3529	▼
11	Devon Duffy	<input type="checkbox"/>	Devon Duffy	DVM	devonduffy@gmail.com		▼
12	Elizabeth Rodriguez	<input type="checkbox"/>	Elizabeth Rodriguez	Veterinary Assistant		(321) 505-6179	▼
13	evelyn york	<input type="checkbox"/>	evelyn york	mrs		(321) 543-2135	▼
14	Jenny Davis	<input type="checkbox"/>	Jenny Davis	Reception		(321) 557-6339	▼
15	Jolanta Kandefer	<input type="checkbox"/>	Jolanta Kandefer	CCRA		(321) 544-6994	▼
16	Keanna Khan	<input type="checkbox"/>	Keanna Khan	Ms		(727) 420-2678	▼
17	Lauren Macura	<input type="checkbox"/>	Lauren Macura	Kennel		(321) 394-6760	▼
18	Linda Madyda	<input type="checkbox"/>	Linda Madyda	Dvm	kenlin@mindspring.com	(321) 639-9888	▼
19	Lindsey Brong	<input type="checkbox"/>	Lindsey Brong	Tech		(321) 961-2138	▼
20	Melanie Rodriguez	<input type="checkbox"/>	Viera East Veterinary Center	Practice Manager	vieraeastvetctr@bellsouth.net		▼
21	Rebecca Smith	<input type="checkbox"/>	Rebecca Smith	Vet Tech		(321) 614-8254	▼
22	robin york	<input type="checkbox"/>	robin york	ms		(321) 652-0124	▼
23	Robin York	<input type="checkbox"/>	Robin York	Vet tech		(321) 543-2121	▼
24	Tessa Fackler	<input type="checkbox"/>	Tessa Fackler	Tech		(321) 438-5468	▼

New Contact Add Relationship

⚙️ 🔄 ⏴

Won't Link to account only contact

Must have all 3 circles

Will Link to contact and account

# Create an Account List View



## Create Account List View

Accounts  
Recently Viewed ▾

50+ items

ALL OTHER LISTS

- 1 2022 My Accounts
- 2 Accounts and Price Books
- 3 Accounts by Current Sales Summary Data
- 4 ALL VA2R16D06 Dennis Inside DM
- 5 ALL VAR02D01 Florida Dennis
- 6 Blocked Accounts
- 8 Business Email List - Dennis
- 9 Clinic Feeding Program Participants
- 10 Clinic Feeding Program Participants -
- 11 Consumer Accounts
- 13 Copy of 2022 Vet Account Consultant

To Customer No	Shipping Street	Shipping City
-0024192-001	619 GREENE ST	ADEL
-0022196-001	1496 CR 5015	SALEM
-502601-001	31940 State Route 122	Minier
-0006322-001	205 South Walnut st	Eldon
-0006170-001	1503 E MAIN ST	CASEY
-0020974-001	714 East State St	ALGONA
-0023811-001	1930 KEOKUK ST	HAMILTON
-100000-5166	11600 SE Mill Plain Blvd Suite 3G	VANCOUVER
-100000-0373	9588 Ridgetop Blvd NW	SILVERDALE
-100000-0385	9450 SE 82nd Avenue	PORTLAND
	20558 STEVENS CREEK BLVD	CUPERTINO
-500092-001	8851 Adams Ave	Huntington Bea
953	4655 Century Boulevard	PITTSBURG
PETCO 0573	(702) 253-7800	107131 3577 South Rainbow Boulevard LAS VEGAS



# VET Reports & Dashboards

Commonly used reports – used by District Managers



# REPORTS | Most Commonly used by DM

- [Reports | Salesforce](#)
  - ✓ List view of all available Reports
- [Trainings Planned/Completed each Quarter | Salesforce](#)
  - ✓ List view showing all your planned and completed trainings by quarter
- [Vet Period Activity: Planned & Completed | Salesforce](#)
  - ✓ List view showing all your planned and completed Events
- [Trainings by Period | Salesforce](#)
  - ✓ List view showing all your planned and completed trainings by period
- [Tasks Open and Completed for Current | Salesforce](#)
  - ✓ List view showing all your open & completed tasks
- [All OLP Target Plans | Salesforce](#)
  - ✓ List view showing all your OLP Target Opportunities



## What are reports?

Reports in Salesforce are ways to visualize all your Salesforce's data in easy-to-read, intuitive formats. With reports, you can see a list of all of your accounts, opportunities, contacts, cases and more all in one fell swoop.

*“A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns and can be filtered, grouped, or displayed in a graphical chart. - Salesforce*

Reports

All Favorites

5 items

Search favorites...

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	All OLP Target Plans		Vet Channel Reports Folder	Jacky Elkins	4/29/2021, 3:21 PM	✓
Created by Me	Tasks Open and Completed for Current		Public Reports	Tom Semanisin	1/10/2022, 11:26 AM	
Private Reports	Trainings by Period	Show me how many seminars are planned out for the year	Core Reports	Tommy Klasener	2/8/2017, 2:51 PM	✓
Public Reports	Vet - Planned Training - Home Page	Planned training by topic for Vet DM's	Vet Channel Dashboard Reports	Jacky Elkins	1/13/2020, 2:56 PM	✓
All Reports	Vet Period Activity: Planned & Completed	Show me what events I have completed and what is planned for this period	Vet Channel Dashboard Reports	Tommy Klasener	2/10/2017, 2:20 PM	✓

FOLDERS

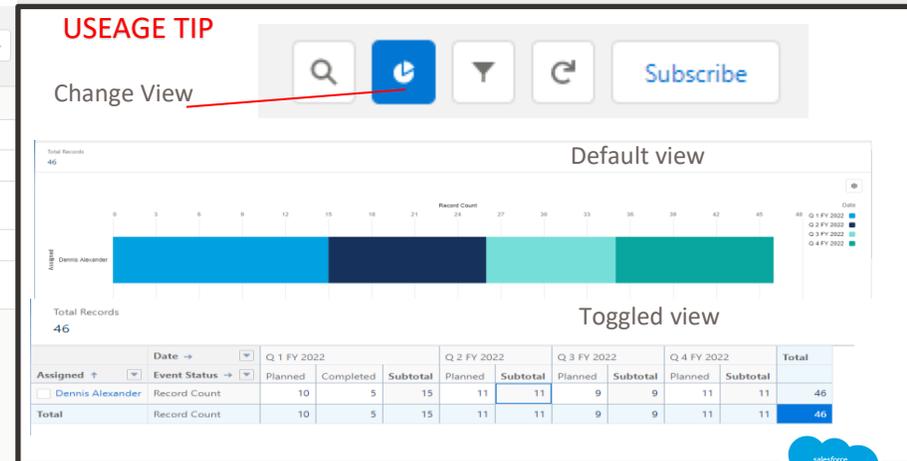
All Folders

Created by Me

Shared with Me

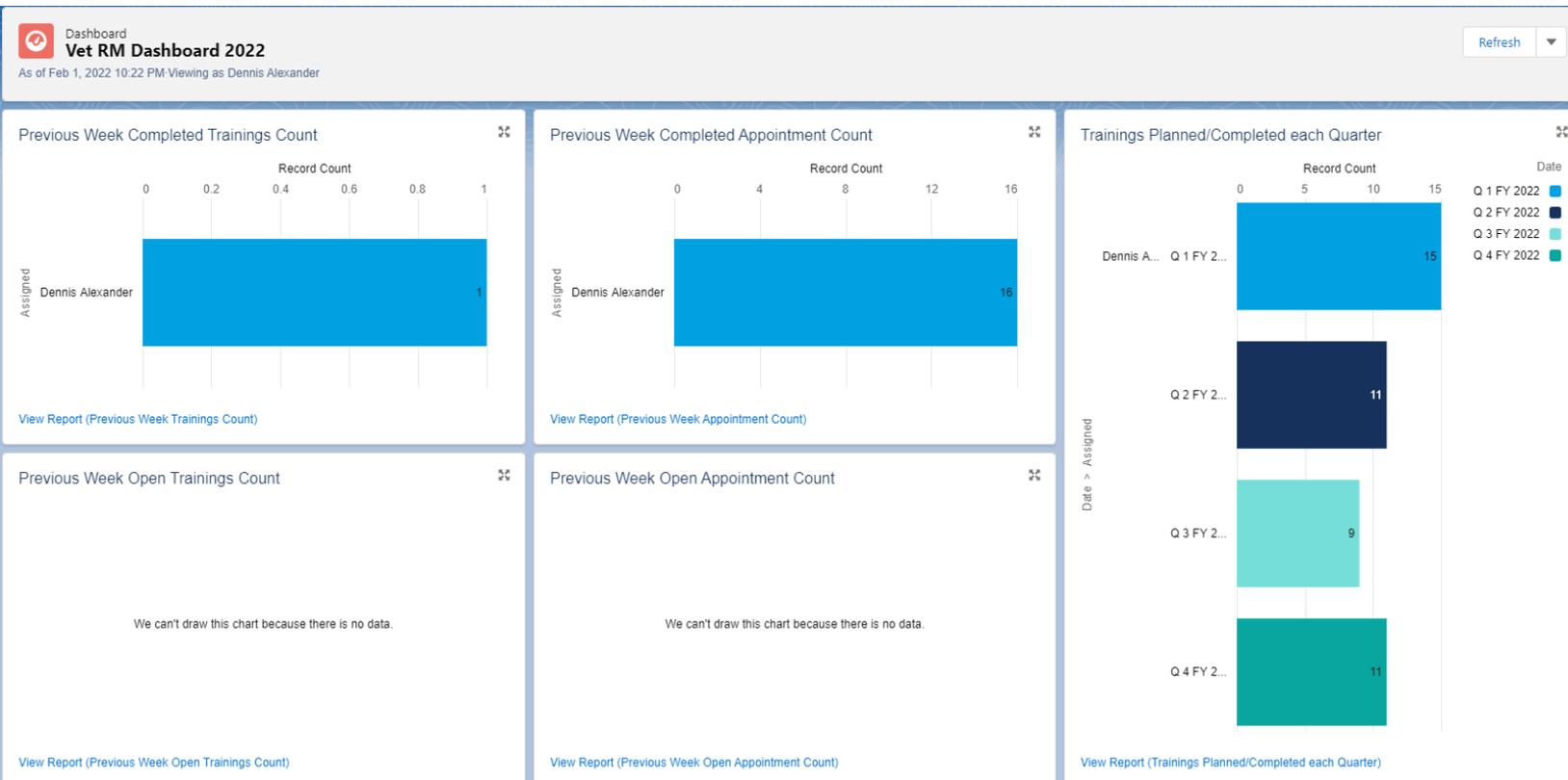
FAVORITES

All Favorites



# Dashboards |

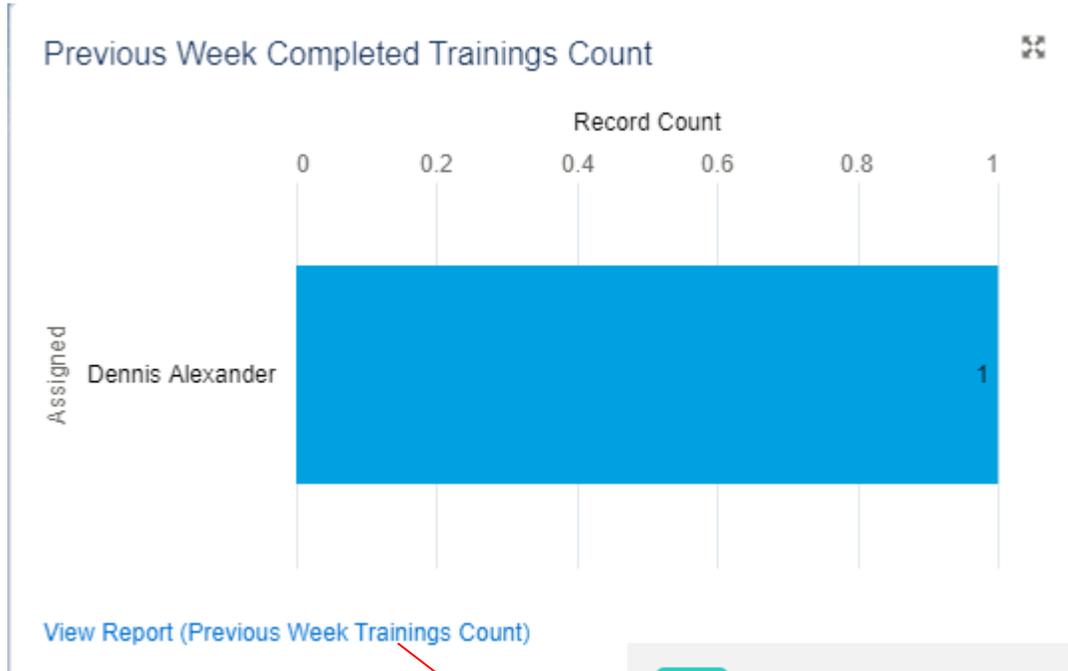
- [Vet RM Dashboard 2022 | Salesforce](#)
- [Vet DM Dashboard 2020 | Salesforce](#)



## What is a Dashboard?

Dashboards are graphic visualizations of reports. Here you can view your Salesforce data in pie charts, bar charts, gauges, donut charts, table views and more. Just like reports, you can also subscribe to them and receive dashboard results in your email. Think of dashboards as a stock ticker, with a highlight of all your Salesforce data in one view.

# Dashboards | Previous Week Completed Trainings Count



**Report: Activities with Accounts**  
**Previous Week Trainings Count**

Total Records  
**1**

<input type="checkbox"/> Assigned ↑	Subject	Account Name	Event Status
<input type="checkbox"/> Dennis Alexander (1)	COMPLETED TRAINING: Island Animal Hosp on Cocoa Beach OLP	ISLAND ANIMAL HOSP ON COCOA BE	Completed
<b>Subtotal</b>			
<b>Total (1)</b>			



# VET Opportunities

# Opportunities | OLP Target Plans



Track and manage your potential opportunities with Salesforce opportunities. Opportunities are plans in progress. Opportunity records track details about targets, including which accounts they're for, who the players are, and the work that you have completed and planned in them.

Navigate to the account page of the account that you are choosing to create an OLP Target Plan for

- On the tool bar, hover over, or select the Opportunities link
- Click New – on the far right
- Populate the OLP Target Plan button, then click next
- Complete all the fields in the pop-up box, click save

The screenshot shows the Salesforce interface for creating a new opportunity. The top navigation bar includes the 'Opportunities (0)' link, which is circled in red. The 'New Opportunity' modal is open, showing the following fields:

- Account Name: Gentlecare Pet Hospital
- Opportunity Name: (empty)
- Stage: --None--
- Current OLP Utilization: --None--
- Probability (%): (empty)
- Objections: --None--
- Close Date: (empty)
- High Level OLP Overview: (empty)
- High Level OLP Challenges: (empty)
- OLP Strategy: (empty)
- OLP Results Achieved: (empty)

A red callout box points to the 'High Level OLP Challenges' and 'OLP Strategy' fields with the text: **32,000 Characters allowed**

# Opportunities | OLP Target Plans



**Opportunity**  
\$ Grow VetSource - Island Animal Hosp on Cocoa

Following Edit Delete Printable View

---

Account Name  
[ISLAND ANIMAL HOSP ON COCOA BE](#)

Close Date  
12/9/2022

Opportunity Owner  
 Dennis Alexander

---

On Track

Closed

Mark Stage as Complete

---

**Details** Related

---

**Account Info**

Account Name <a href="#">ISLAND ANIMAL HOSP ON COCOA BE</a>	Website <a href="https://islandanimal.com/locations/cocoa-beach/?utm_source=google&amp;utm_medium=organic&amp;utm_campaign=gmb&amp;utm_term=website">https://islandanimal.com/locations/cocoa-beach/?utm_source=google&amp;utm_medium=organic&amp;utm_campaign=gmb&amp;utm_term=website</a>
Region Name Brady, Greg	Phone (321) 783-6463
Classification Core	Hospital Contact for OLP Justina cutler
#FTEs 2.00	

---

**Opportunity Details**

Opportunity Name \$ Grow VetSource - Island Animal Hosp on Cocoa	Stage On Track
Current OLP Utilization Underutilizing	Probability (%) 80%
Objections	Close Date 12/9/2022

---

**Plan**

High Level OLP Overview Clinic 2021 usage: Vetsource \$732, and PPs \$14,858	High Level OLP Challenges Clinic needs to have direct link on website not just generic vetsource link.
OLP Strategy Quarterly Trainings planned with the 3 Ambassadors. Online Pharmacy training, more direct training to keep them involved in actively making it part of their daily habits. OLP Contest with staff for end of Q1 - Q2 for 20% Increase.	OLP Results Achieved 4 Quarterly trainings scheduled with the 3 ambassadors. Completed 2021 Review and redesigned QR Label with Ambassadors. Further trained on outside RX and set up OLP Contest to end in Q2: 20% growth (need to be 23% at end of Q2 to win)

**Activity** Chatter

---

**Open Activities (3+)**

**TRAINING: Island Animal Hosp on CB**

Name: [ ]

Task: [ ]

Due Date: 5/11/2022

**Q2 OLP Contest Ends**

Name: [ ]

Task: [x]

Due Date: 6/17/2022

**TRAINING: Island Animal Hosp on CB**

Name: [ ]

Task: [ ]

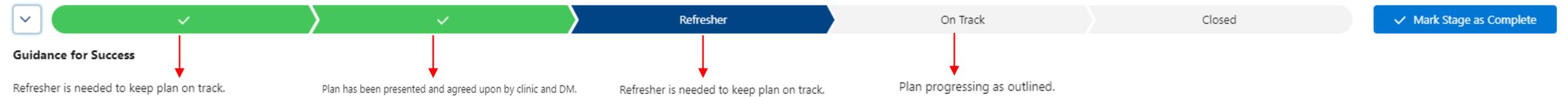
Due Date: 8/10/2022

[View All](#)

# Opportunities | OLP Target Plans



<b>OPPORTUNITY IDENTIFIED</b> – Clinic identified as high potential to grow OLP business.	<b>ONBOARDING</b> – Plan has been presented and agreed upon by clinic and DM.	<b>REFRESHER</b> – Refresher is needed to keep plan on track.	<b>ON-TRACK</b> – Plan progressing as outlined.	<b>CLOSED</b> – Objectives of plan are complete.
---	---	---	---	--





## Video - Perfect Clinic

To be completed by DM quarterly

Perfect Account Name

Account

### Physical

- |  |  |
|--|--|
| <input type="checkbox"/> Carries Majority Small Bags (8) ⓘ       | <input type="checkbox"/> RC Client Facing Materials (6)          |
| <input type="checkbox"/> Small RC Display In Lobby (8) ⓘ         | <input type="checkbox"/> Dog and Cat Separate Waiting Room (2) ⓘ |
| <input type="checkbox"/> OLP/Autoship Branding In Lobby (3) ⓘ    | <input type="checkbox"/> Pricing Info Visible in Lobby (8) ⓘ     |
| <input type="checkbox"/> Elevated Feline Carrier Placement (2) ⓘ | <input type="checkbox"/> GI Crash Cart in Treatment Area (9) ⓘ   |

### Protocol

- |   |  |
|---|--|
| <input type="checkbox"/> Clinic Will Do Trainings (20) ⓘ  | <input type="checkbox"/> Intake Sheet, Nutrition Questions (5) ⓘ |
| <input type="checkbox"/> OLP Protocol for Checkout (12) ⓘ | <input type="checkbox"/> Auto-Ship Clinic Incentive (12) ⓘ       |

Brand Advocate/Nutrition Advisor (5)



# CORE | OPPORTUNITIES

[Video - OLP Target Plan](#)

[VIDEO - OLP Cloning Opportunities from one year to another](#)





# Personal Settings

# Personal Settings | **How to videos**



[Video - Change your default browser](#)

[Video - Create a Custom Calendar](#)

[Video - Save a view in Einstein Analytics](#)

[Video - Outlook Calendar Color Coding](#)

[Video - Home Screen Navigation & Setup](#)





# Cases

# Cases | How to



Opportunities (0) Related Contacts (10+) **Cases (10+)** Notes & Attachments (1) Files (0) Notes (1) Account History (10+) Perfect Accounts (0) GHA Kits (0)

**Cases** 10+ items • Sorted by Case • Updated a few seconds ago

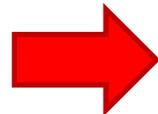
Case ↓	Case Record Type	Date/Time Opened	Status	Case Reason	Subject	Owner
--------	------------------	------------------	--------	-------------	---------	-------

New Case

Select a record type

- Supply Chain  
Used to track Supply Chain issues from Order/Tech Services (SCH-0080)
- B2B Help  
This record type will be used by order services to log cases for B2B website help. (SCH-0050)
- Credit Request  
Used for Credit requests from Customers. (SCH-0230)
- Data Setup  
Used to track Master Data change requests from Order/Tech Services/Field Sales. (SCH-0050)
- Finance  
Used to track Finance change requests from Order/Tech Services/Field Sales. (SCH-0062)

Cancel Next



Complete the fields required for the type of case you are opening, then click save.

New Case: Credit Request

Case Owner: Dennis Alexander

Case Reason: Credit Request

Status: Pending

Account Name: ADEL VETERINARY CLINIC

Is estimated value over \$500?

Email Address for Confirmation:

Credit Total:

Nav Credit Memo:

Sales Order #:

Description Information

Subject:  Web Email:

Description:

System Information

Case Record Type:

Cancel Save & New Save

On a credit request case: remember to enter the products being returned under the **related** tab.

Account Details

Case Products (1)

Case Products Name	Product	SKU	Quantity
CP#0000075205	Urinary SO MIG Can 24/3oz-Cat	60434	48

Files (0)

New Case Product

Information

Case Products Name

Case: 00526606

Product: hydro

Show All Results for "hydro"

- Hydro Pro Dry 7.7#-Dog DOG
- HYDRO PROT CAN 24/13.7 oz-Dog DOG
- Hydro Pro Dry 7.7#-Cat CAT
- Hydro Pro PS Dry 8.8# - Dog DOG
- Hydro Pro Dry 25.3#-Dog DOG

Search more products by selecting "show all results"

Save & New Save





Case Type: B2B Help – You will need to know the type of device and browser that the customer is/was using.	
Application errors	To be used if there is an error with an application. EX. App needs to be reprocessed due to failure or account number is missing in OMS/ B2B.
B2B Bug Error	Customer or Agent encounters a glitch or bug on the website.
Credit Card Error	To be used if a customer encounters issues adding/ checking out with a Credit card. EX. Customer attempts to add in CC, but the page doesn't respond.
D2C Error	For any errors or questions related to the D2C platform. (Shop.royalcanin.com)
Order Help	To be used if the order never made it to Salesforce or a customer can't place an order.
Other	Anything else that doesn't fit in the other categories.
Promotion Errors	A customer experiences issues where they are not receiving a discount at checkout.
RC Academy	A Customer experiences issues with RC Academy, usually involves RC Points
Username/Password Issues	To be used if there is an issue with a username requiring a Password reset, <b>Update to the email address on the username</b> , or other related issues.
Unblock/Block Username	To be used for reactivating or deactivating a username on B2B. EX. Username1 needs to be deactivated since the clinic no longer needs it.
Case Type: Data Setup	
Application Errors/Questions	If you are providing additional information for a pending application, use this case reason to submit the documentation.
Client Type Update	For National Account Managers Only
Feeding Program Updates	When there need to be updates made to any feeding program account.
Invoice Discrepancy	This is when an invoice has not generated/posted, or has an error causing it to not post. If the customer is saying they were not charged correctly, please use the FINANCE case type and select "Invoice Issue".
Other	For any issue that doesn't fall under the other categories.
Payment Terms/ACH	If a customer's payment terms need to be updated or changed. <ul style="list-style-type: none"> <li>Use this case reason if the customer is going from one payment type to another. Ex, CC to ACH.</li> </ul> <b>DO NOT attach the ACH form to the case.</b> This must be emailed in. Please reference your case number in your email.
PRO Customer Updates	Any update that needs to be made to a pro customer account. This includes email, phone, name, documentation on file.
Remove Tax Exempt Status	If a clinic has changed Tax Statuses and needs us to update our system to reflect it.
Unblock/Block Account Request	This should only be used when an active account needs to be blocked from ordering. Make sure that you include the reason that you are blocking in the description, who has requested the account to be blocked and the date that the account should be blocked. Ex: Change in ownership, account closing, or CFP account leaving the industry.
Vet Clinic Updates	Any change made to the customer information such as phone, email, address, new DVM license etc.
Vet Clinic Change in Ownership	When the clinic has sold to another vet, not a purchasing group. If it involves a national account or purchasing group, the NAM will handle that.

## Case Definitions PDF

### New Case

Select a record type

- Supply Chain  
Used to track Supply Chain issues from Order/Tech Services (SCH-0080)
- B2B Help  
This record type will be used by order services to log cases for B2B website help. (SCH-0050)
- Credit Request  
Used for Credit requests from Customers. (SCH-0230)
- Data Setup  
Used to track Master Data change requests from Order/Tech Services/Field Sales. (SCH-0050)
- Finance  
Used to track Finance change requests from Order/Tech Services/Field Sales. (SCH-0062)

Cancel Next

# Cases | Videos

[Video - Case Definitions](#)

[Video - How to create a Credit Case](#)





# EAC – Einstein Activity Capture

# Cases | Definitions

[Video - Outlook 365 Integration](#)

[PDF - Mirroring in 365 integration](#)

[PDF - Contacts & CFP knowledge](#)



Office 365 Contact Sync Fix.pdf





B2B – [my.royalcanin.com](https://my.royalcanin.com)



The screenshot shows the login page of the Royal Canin Pet Professional Online Portal. At the top, there is a navigation bar with a menu icon on the left, the Royal Canin logo in the center, and a phone and user profile icon on the right. Below the navigation bar is a search bar with a magnifying glass icon and the text "Search". The main content area features a large red heading: "Welcome to the Royal Canin® Pet Professional Online Portal!". Below this heading is a horizontal line. Underneath the line, the text "Existing users" is displayed. Below "Existing users" are two input fields: "Username" and "Password", each with a horizontal line below it. At the bottom of the input fields, there is a button labeled "Click for access".



# Support -



- **2 Weeks planned ahead** - TRAININGS & APPOINTMENTS
  - Daily **MINIMUM** if In Person calls = **2**
  - Daily **MINIMUM** if Virtual = **4**
  
- **Salesforce Notes** – must be completed **DAILY** by end of each day
  - QUALITY notes means Description includes:
    - Who you spoke to
    - What you spoke about and what was accomplished
    - Next steps are **SPECIFIC** and scheduled in SF calendar at end of call
    - **PLEASE NO ABBREVIATIONS THAT OTHERS CANNOT INTERPRET – SF notes are intended for all to read & utilize**



## 2022 VET SALES PLAN-ON-A-PAGE








- ### 1 Rebuild the Core

  - Inadequate Training
  - Strategic Portfolio Choices –
    - ✓ Transversal Activations (SoL, Cat, Trust)
    - ✓ Core 3 Focus (Derm, GI & Urinary)
  - Delivering right content to the right audience
  - Build on Picture of Success with (S)Elective Distribution
- ### 2 Develop Subscription & Compliance

  - Vet Relationship
  - Inadequate Training
  - Admin Tasks
  - Build capabilities through coverage model – Expand beyond kibble to a Health Company
  - Test and learns (with VetSource) – From Autoship To Subscription
  - Increase usage in clinics
- ### 3 Increase Path to Recommendation

  - Owners don't trust us
  - Overwhelming demand
  - High workload
  - Implement recommendation tracker
  - Build capabilities through coverage model – Expand beyond kibble to a Health Company
  - Refine clinic classification – Not all things to all clinics
  - Leverage health outcome-based data for use cases – Case based training

Drive a recommendation at every visit for every cat and dog

## 2022 PLAN-ON-A-PAGE- FIELD LEADERSHIP








- ### 1 Rebuild the Core

  - Regaining Trust – Leveraging Classification model, Field team will consistently engage our partners with high impact activities
    - Trainings- In clinic & virtual quality trainings will be a cornerstone of our activities in our Top tiered classified clinics
      - Core Product training
      - Health & Well Being
      - OLP training
      - Virtual CE
      - KOL CE
      - Conference & NA event support
- ### 2 Develop Subscription & Compliance

  - Intentional planning with key partner hospitals to help develop their engagement with OLP
    - Engage with DSS in key markets to deliver high level of training with key hospitals
    - OLP in clinic trainings will continue to be a priority & developing a targeted pipeline will be our focus
- ### 3 Increase Path to Recommendation

  - Understanding the “Pain Points” of our hospital partners will guide the solutions we will provide
    - Innovative programs (Health & Well being)
    - Create momentum in our Winning in Cities strategy
    - Embracing Picture of Success in our Hospitals
      - Staff Knowledge
      - Walk out Reco
      - In Clinic Merchandising
      - Subscription

Drive a recommendation at every visit for every cat and dog

Field Team's Responsibilities

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## DIFFERENCES IN ROLES

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### Cities KAM role

- 60 accounts
- 3-4 calls a day
- JBP – (Majority of Accounts)
  - Uncovering “Pain points”, leveraging City Insights, Detailed planning throughout the year
- Educate- 50 per Quarter
  - HOT Trainings
  - Pod trainings
  - Health company objectives
  - Tech training
- Innovate- Implement various City programs dictated by City Data in majority of accounts to help prepare our hospitals to meet the needs of Urban pet owners

### VET DM role

- 150+ accounts
- 5-6 calls a day
- JBP – 3 to 5 accounts (less than 5% of accounts)
- Educate- 30 per quarter
  - OLP
  - Core products
- Innovate- Quarterly targets

# Support | National Account & Key Account managers - 2022



-  NVA
-  PVCC

